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Memorandum

TO: BATA Oversight Committee

DATE: May 7, 2014

FR: Executive Director

W. I. 1254

RE: FasTrak® Regional Customer Service Center Relocation

Based on a competitive procurement, BATA entered into a contract with ACS State & Local Solutions, Inc. (ACS) on December 31, 2003 for management and operation of the FasTrak® Regional Customer Service Center (CSC). ACS subsequently was acquired by Xerox State and Local Solutions, Inc. (Xerox.) Under the contract, Xerox provides the FasTrak® account management system, transaction processing, call center operations, web services, payment processing, customer communications, violation image review and noticing.

In January 2013, Xerox was also awarded the contract to upgrade and operate the CSC for a new five year term which was scheduled to commence operations on October 1, 2014 at 375 Beale Street. In January 2014, this Committee authorized an extension of the existing Xerox contract to operate the current CSC until the new system development is complete in September 30, 2014. In addition, due to expiration of the current lease at 475 Embarcadero in San Francisco, this Committee authorized a contract change order to fund an interim space for the customer service center until 375 Beale Street is ready for occupancy in 2015. This item is to provide information about transitioning the system and staff during these two relocations and the plans for ensuring the impacts are minimized.

Interim CSC Relocation

The 2013 Xerox proposal to operate the new CSC assumed that the center would be located at 375 Beale Street. Because of ongoing construction, the CSC cannot be located at 375 Beale Street until late 2015. Xerox was not successful extending the lease at the current CSC location at 475 Embarcadero beyond June 2014. An interim space for the CSC was required for the intervening period until 375 Beale Street is available. BATA and Xerox staff identified and this Committee approved a short- term lease at 62 First Street in San Francisco for this purpose.

Since January, Xerox has been planning and executing the relocation activities. This includes building out the space at 62 First Street to accommodate the FasTrak® call center, payment processing activities and the walk-in center. The space at 62 First Street is expected to receive a certificate of occupancy by June 5, 2014 which leaves two available weekends during the month of June to relocate the system and staff. The move is scheduled for the first available weekend with the second as a back-up. Due to the short time frame to build a new server room and relocate the aging equipment, BATA and Xerox determined the most reliable means to re-establish the database and web equipment was to relocate to Xerox's data center in Tarrytown, New York. Xerox has been procuring and configuring this equipment.

The current schedule for the relocation of CSC operations to 62 First Street is from Thursday, June 12 to Monday, June 16. During that time period the furniture, Customer Service

Representative workstations, phone system and office equipment will be moved from the Embarcadero location to First Street, the system stopped, and the data relocated to the servers in Tarrytown and validated before starting up again.

During the relocation, the web and phone system will be unavailable for account access, payment processing or "live" customer service. Customers who call the customer service number, go to the website, or go to cash payment network terminals will receive messages that the service is temporarily unavailable due to a planned outage and will be available again as of June 17. We recognize this will be an inconvenience to some customers and are working to minimize the impacts. We are planning a communication strategy with messaging beginning in mid-May to prepare customers in advance for the outage. In addition, the CSC plans to expedite payment processing after the CSC reopens and to manage outgoing correspondence such as statements, invoices and notices over several days so that the CSC can efficiently and accurately work through the backlog, to allow extra time for patrons to make payments, and to manage the resulting expected growth of incoming calls.

We note that 95% of FasTrak[®] customers use credit cards to replenish their accounts and should experience little to no impact from this outage. Violators will be given extra days to send their payment or pay online once the system reopens and before the violation becomes delinquent. Golden Gate Bridge invoices will be held for several additional days before being sent to allow customers to enroll online with FasTrak[®] accounts to receive their discounted toll rate or sign up for One Time Payments. For those who choose to pay by check, payments can be sent at any time to the post office box.

We anticipate that even with these allowances, there will be higher than usual call volumes due to the pent up demand after the five day outage; however the goal is to manage it as efficiently as possible so that it will quickly return to normal levels. In addition, BATA staff will be on site during the relocation weekend to ensure activities progress according to schedule, validate the system and to monitor the center closely after the reopening to ensure issues are identified and addressed. We have emphasized to Xerox that they need to have sufficient staff available to handle higher volumes and minimize degradations in service. The Key Performance Indicators, which include standards for call answering, payment processing and notice mailout will remain in effect.

This relocation will be the first of three significant service disruptions over the next eighteen months. In November 2014, the upgraded customer account management system, which includes significantly improved features for customer service representatives and a new website, will be ready for service. This will require a system outage over several days to reformat and migrate the data to a new platform and validate it on the new system before re-opening the system for customer access. There will be another outage in late 2015 when the operation and staff are relocated from 62 First Street to 375 Beale Street. Staff will provide more details about the impacts of these outages when the transition plans are developed.



Steve Heminger

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